DOCUMENTS 7

Technical Description

SUMMARY

A presentation of the features in DOCUMENTS 7.

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Introduction

When you are in the process of selecting a vendor for automating your document process, many factors affect your decision. The IT Department—those who control, manage, and maintain the system—may have crucial input. Other important input comes from the supervisors or administrators who are to configure and maintain the solution, in order to make the process as effective as possible.

Much of the information currently available about the vendors and their offerings is either too technical and too voluminous (it feels like reading a manual) or contains too little technical information to answer the questions posed by the IT Department or supervisors—questions such as:

- How can ReadSoft supply the tools to make *their* daily tasks easier and faster in order to free resources for more important tasks.

- How flexible is the installation *really* (considering customizations, licenses, scalability, and administration)?

- How can ReadSoft's products integrate with other vendors' products that are (or soon will be) in place?

These are some of the questions we encounter. The intent of this document is to answer these questions, and many others, by describing in a more technical way how ReadSoft can help you to automate your document processes.

If you would like an even more technical description of ReadSoft's offerings, please see XXXX. For a less technical overview, see YYYY.

ReadSoft Document Process Automation

Document process automation is made possible with DOCUMENTS, which not only captures images and extracts relevant information, but also understands the different documents that enter the system and automatically sorts them for you.

With its unique functions for self-learning and compound handling, DOCUMENTS is the world-leading solution for helping companies around the world to perform at the highest level. Reducing costs, improving efficiency, and improving customer service is what DOCUMENTS is all about.

Together with ReadSoft Alliances Partners network, DOCUMENTS is used by thousands of customers around the world to automate business processes. For example:

- Automating Accounts Payable with invoice capture

- Automating application handling, such as mortgage or credit card applications

- Automating case management, such as insurance claims handling

- Automatic legal contract archiving

- Personnel file archiving

- Customer Order processing

- … and many other document types and processes

The following sections describe how ReadSoft is the market leader in these document processes thanks to features available in DOCUMENTS 7.

DOCUMENTS 7

DOCUMENTS 7 is a business process platform that, in combination with ReadSoft Alliance Partner solutions, can be configured to fit any customer's automation needs. DOCUMENTS 7 is easy to set up in order to build customized solutions that are **flexible** so that new processes easily can be added, and **secure** in order to meet your stringent security requirements.

By adding sorting and extraction functions to the business process with DOCUMENTS 7, the solution can reach higher levels of automation, which adds more value, accelerates ROI, and increases security throughout the whole process—from the time you receive a document, through workflow and ERP solutions, all the way through to archiving and ECMs.

What makes DOCUMENTS 7 unique?

DOCUMENTS 7 is unique because it can deliver the following valuable parameters that allow IT departments to grow with the system, while assisting supervisors in maintaining and enhancing the company's business processes:

- Deployability – MSI support, Soft license, Cloud enabled, Web and Citrix access, One true platform, Windows services, System environment and database support

- Scalability – Workstations and servers, Flexible licensing, Setup and configuration, remote scanning

- Security – Single sign-on using Windows Authentication, DOCUMENTS' built-in user access control, Database security, System control (Supervision and REPORTER)

- Maintainability and supportability – Upgrades and updates, Data backup, Product documentation, Online knowledge base, User support, Log files, Troubleshooting using AppSight Black Box

- Stability and accuracy – Release module with main track and feature track, Validations, queues, and data capture security, System and network load

- Configurable and customizable – Validation rules, Advanced API, Software Development Kit (SDK)

- Compatibility – Scanners, Network and Communications Protocols, compatibility with other systems, databases, workflows and archives

- Usability – user friendliness and what type of skills are required to make minor enhancements or major changes to existing solutions

Each of these parameters is described in the following sections to show how these are delivered with DOCUMENTS 7.

Deployability

It is important that a solution is easy to deploy, even if it is done remotely or in a cloud environment. It is also important for the IT manager that the system is easily integrated with existing infrastructure. ReadSoft has chosen to support this by various means.

MSI support

MSI support allows DOCUMENTS to be installed, removed, or updated silently or non-interactively. *Silent installation* allows the IT staff to predetermine and configure the installation. All settings are installed in a configuration file. No messages or progress bars are

displayed, but IT staff is in complete control of installation. *Non-interactive installation* is similar, except that status information is displayed.

MSI support is important in large organizations, especially where hundreds workstations need to be installed or updated. Servers may also be difficult to reach – a server might be located in an offshore location – and a manual installation or update would be almost impossible.

Soft license

Having a single license gives you the ability to capture a variety of different documents for different departments and business processes. You set up the license on a server that is accessible by all workstations in the system. Up to 250 users can use this license simultaneously, making DOCUMENTS available anywhere on a network and ensuring that you have the correct features and capacity (credits).

You can use a VMware workstation (or any other form of virtual workstation) as a license server.

Cloud enabled

DOCUMENTS is also available as a service on the cloud (see http://www.readsoft.com/readsoft-online.aspx for further information). Services on the cloud have many advantages over procuring your own installation: You are freed from looking after the servers and maintaining the solution. There is no need to worry about hardware, performance, or what new versions or updates may be available, since that is taken care of by the service supplier.

Web and Citrix access

All DOCUMENTS modules can be accessed through Citrix and Terminal Services. All invoices can also be verified using the Web client which allows the user to control the invoice, i.e. verify the extracted data and line items, in the same way as a thick Verify client.

One true platform

DOCUMENTS can be considered to be the one true platform—with one installation and one Administration module—for all business processes in an organization.

Having one Administration module where all business processes are configured, enhanced and maintained is very effective for IT departments. It personnel does not need to learn numerous interfaces or have expert skills in them in order to maintain the system. All settings and configurations for all business processes are located in one central place with easy access.

Windows services

ReadSoft Production is the module that can act either as a server or a thick user client. To make the installation as flexible as possible, Windows Services are used for activities that do not require any user interaction. These activities are logged for traceability and security.

DOCUMENTS includes Windows Service configuration right in its own user interface. Here all necessary settings can easily and quickly be configured or changed. You avoid the difficult and time-consuming configuration and troubleshooting that are commonly associated with Windows Services.

System environment and database support

DOCUMENTS is a Windows-based application and can therefore be run on the latest Microsoft Windows operating systems. DOCUMENTS is certified on all new OS releases after thorough testing. Please see the DOCUMENTS Fact Sheet for details on supported operating systems.

DOCUMENTS also supports Citrix and Terminal Services. Using Citrix, large businesses can have large numbers of clients with different configurations.

Both small organizations with small storage needs and large enterprises with extensive storage needs are supported by DOCUMENTS using Microsoft SQL Server and Microsoft SQL Server Enterprise. Please see the Fact Sheet for further information.

Scalability

If we need to automate more business processes, will DOCUMENTS be able to handle that?

How can we handle the extra throughput during peak periods?

If document volume is greater than anticipated, can we easily adjust our DOCUMENTS license?

These and many more questions regarding the scalability of DOCUMENTS are often received. And the answers are easy, because DOCUMENTS is enormously scalable. With a very flexible license and a product that is easily installed, set up and configured, the most difficult scenarios can be solved easily and quickly. ReadSoft is therefore considered to deliver the highest ROI when compared with other vendors.

Workstations and servers

DOCUMENTS consists of two modules, the Administration module and the Production module. Additional modules, the Invoice Verify, Invoice Manager, and Invoice Optimize, are also available to optimize the throughput, accuracy and efficiency of invoice processing.

- The Administration module is where the solution and the business process is set up and configured.

- The Production module performs the activities necessary to process the documents. It can act as a server or a workstation, depending on what it is set up to do. This means that if a server goes down, or if there is an unexpected peak of incoming work, a workstation that is normally used for verification can easily be used (without any additional installation or configuration) for unattended services to increase the throughput to the Verify operators until original server is running again. And vice versa—a server can be used as a Verify or Inspect station when needed.

The workload between the servers, or unattended processes, is automatically balanced between them to optimize the speed of the process and to avoid bottlenecks. The processes can also take full advantage of excess hardware capacity and multiprocessors.

As mentioned previously, both thick clients and thin clients (for invoice processing) are available. As with any web-based clients, thin clients should only be considered for simple tasks or excess work, while thick clients are to be used for everyday work.

Flexible licensing

Organizations know that there are always going to be both expected and unexpected peaks of incoming work. DOCUMENTS has a flexible license that counts number of documents processed and not the number of servers or workstations installed. It is therefore easy to quickly install new workstations and add to the system at no charge when needed.

The flexible license also allows any type of features available in DOCUMENTS to be used, which means that all functionality is available right from the beginning. No extra modules, licenses, consultancy or complex configurations are required. Credits corresponding to the features actually used by your solution are simply deducted from the existing license.

For example, barcode scanning costs fewer credits than processing invoices with line items and automatic document separation (i.e. no presorting or separator pages required). This means that an organization can start using DOCUMENTS to capture barcodes, and when more advanced data capture or automatic sorting is required, these can be activated simply by adding them to the existing solution. All that is needed is more credits, which can easily be purchased.

Again: No extra modules or coding are required, since everything is ready for use right from the start!

Setup and configuration

It can be time-consuming to set up and configure document process automation. Most of the time, many expensive consultancy hours are required before the solution is production ready. Even if the skills are available within the organization, the user interface is often limited or too difficult to use with any efficiency. Small enhancements or changes can therefore be very difficult or expensive to implement.

DOCUMENTS contains pre-packaged solutions for invoice processing and order processing. Additional pre-packaged solutions are in the works. "Pre-packaged solutions" contain the most frequently used fields, validations and document types, so that a solution can be production ready in no time. A pre-configured solution saves a lot of time and makes setup easy and fast.

All pre-packaged solutions are available in the setup interface, i.e. the Administration module. The Administration module is user friendly. No programming skills are required to get a solution or a business process into production.

If the features and settings available in the Administration module are not sufficient to meet the businesses' needs, customizations can of course be added. Easy-to-use manuals and a well-documented API make the job easy, even if you have limited programming skills. Partner and ReadSoft expertise are also available to assist you.

The Administration module makes DOCUMENTS unique. It is not just a toolbox that needs to be customized in order to work. DOCUMENTS is a more like a plug-and-play product. One "super user" can configure the system according to an organization's needs. Fewer people need training, and less system administration is required The cost of ownership is therefore low.

DOCUMENTS allows any solution, from the simple to the very complex, to be configured for both high and low volumes. Some of the main features that can be configured are:

- How documents enter the system (for example by scanning them or importing files).

- How documents are sorted and classified.

- Which data is extracted.

- How information is transferred or outputted to a target system.

Please see below for a quick walkthrough and the ÅÅÅÅ for a more detailed overview.

Document input

DOCUMENTS allows documents to be imported in many different formats and from a variety of sources. This provides a scalable and flexible solution, and safeguards your investment. Available sources and formats are:

- Scan your documents using one of the certified scanners from six popular manufacturers.

- Input XML files, PDF files, or image files of many different formats.

- Input documents received by telefax, email, or other source.

- Import emails with attachments and body text using COLLECTOR

- Remote/distributed scanning: Scan where you are using MFP and COLLECTOR. No paper transport!

- Capture of paper; local scanning; remote scan. Scanning from other locations is built in the product and gives less hardware and software installation needed locally. Also gives secure transfer over bad lines.

Document sorting

Document sorting uses advanced algorithms and business logic to separate a batch of pages into documents and compounds (case files, for example) by reading the content of the pages. This is done using Automatic Document Separation, Automatic Classification, and Advanced Document Grouping.

- **Automatic Document Separation (ADS).** Incoming batches are automatically separated into documents based on the content of the pages. ADS determines where a document starts and ends, and what type of document it is, simply by reading the content of a page or a set of pages. This makes it unnecessary to use separator pages or barcodes to presort the documents in a batch before it is scanned.

  Document preparation is normally an activity that requires a lot of time. It can also be expensive, considering that Support or some other part of your organization would like to know as soon as possible if a particular document has been received and where it is in the process. So ADS is very valuable to use.

- **Automatic self–learning classification.** The system analyzes sample documents and identifies unique words or phrases that can be used to classify them. Each document is classified as a certain type and matched to a specification.

- **Advanced automatic document grouping.** The documents are collected into logical groups. DOCUMENTS is unique in using these *compound documents* to organize multiple documents that belong together into one case file. Example of compound documents are mortgage applications, loan or credit card applications, or an order that contain several order pages with a summarizing header sheet.

Data extraction

DOCUMENTS can extract almost any type of data. Different techniques are used to achieve the best results, whether it is handwritten or machine-printed data. DOCUMENTS has its own internal interpretation engine, and it also uses third-party OCR engines to capture data. Together they get the superior results that ReadSoft is known for.

In addition to extracting handwritten and machine-printed data, these world-leading features are also available:

- Barcode extraction in Scan. When scanning, DOCUMENTS can extract information from one or more barcodes. This can be used for early routing or archiving, which is useful when you need to store, prioritize, and validate documents. The result is more secure, faster and flexible processing.

- Advanced line-item capture. The availability of many different line-item structures provides great flexibility and safeguards your investment. In many cases, line items are captured automatically, and you only need to approve the captured data by validating that the sum of all line items adds up to the total sum of the invoice or the order.

- Automatic validation. You can set up the system to validate extracted data according to specific conditions or external tables. You can also specify how you wish to handle situations when the data does not meet the validation requirements.

- DOCUMENTS is a Unicode application, which means that it supports languages with double-byte characters. You can process all languages in one solution, which is efficient and saves a lot of time.

- Self-learning. Changes made to an extracted field are saved and remembered the next time the same field appears again.

- Extraction of semi-structured documents. DOCUMENTS offers advanced line-item capture and self-learning on invoices.

- Advanced invoice capture using country-specific *invoice profiles* that match data against your ERP database.

- Extraction of data from unstructured documents. DOCUMENTS finds the header and line-item data without templates.

Document output and information delivery

DOCUMENTS does not have any preference as to where or how it outputs the data that results from document processing. On the contrary, DOCUMENTS offers many different ways of transferring or releasing the data. This gives you faster integration time, easier administration, more secure integrations, and low cost of ownership.

The available options are:

- Output formats of your choice – PDF/A, searchable PDF, XML/XSLT, simple text files, and email. All of these can be complemented with a full-text OCR result that can be used for your archive, making possible detailed searches.

- Microsoft SharePoint. DOCUMENTS has a standard connector to Microsoft SharePoint.

- Advanced system integration via ReadSoft Service Bus, a component that can be added to DOCUMENTS. RSB can integrate with various target systems. See below for further information.

ReadSoft Service Bus

ReadSoft developed ReadSoft Service Bus (RSB) in order to help ReadSoft Alliance Partners and customers to quickly and easily develop integrations to their business solutions.

ReadSoft Service Bus is a centralized, web-based, service-oriented integration platform that uses connectors to bridge two systems, allowing reuse of components across multiple systems. It extends ReadSoft solutions by providing universal capabilities for integrating and customizing document-driven processes.

ReadSoft Service Bus provides two types of standard integrations:

- Document services – used to transfer documents (images and extracted data) from one system to another.

- Data services – one system uses data in another system (for example master data).

It also includes process supervision with notifications.

RSB has many connections available for DOCUMENTS and different target systems. Additional connections can be implemented using its Software Development Kit (SDK). The SDK is a tool that makes it easy to develop new and customize connections with target systems, reducing development time.

RSB delivers these valuable parameters to ensure data security and easy to maintain and support:

- High-security data transfer.

- Real-time master data validation.

- Import of master data into DOCUMENTS.

- Software Development Kit (SDK).

Security

Security is important for all organizations. There are many aspects of security: user access, database access, system control, and more. ReadSoft has chosen to address these important issues in many different ways that can fit all requirements.

Single sign-on using Windows Authentication

There is no need for users to log in to both Windows and DOCUMENTS, since our solution allows single sign-on using Windows Authentication. Existing Windows user groups and user accounts can be used, or you can set up unique ones for

DOCUMENTS. The users can also be linked to Microsoft's Active Directory. This offers both good control and fast and easy access for users.

DOCUMENTS' built-in user access control

As an altnerative to Windows Authentication, you can use the built-in user access control. Here you can set up user profiles that are used *only* by DOCUMENTS.

DOCUMENTS users can be assigned different roles and user rights. This means that the IT staff or the "super user" can control what activities users can run, what types of business processes and solutions they are part of, and what document types to show to each user.
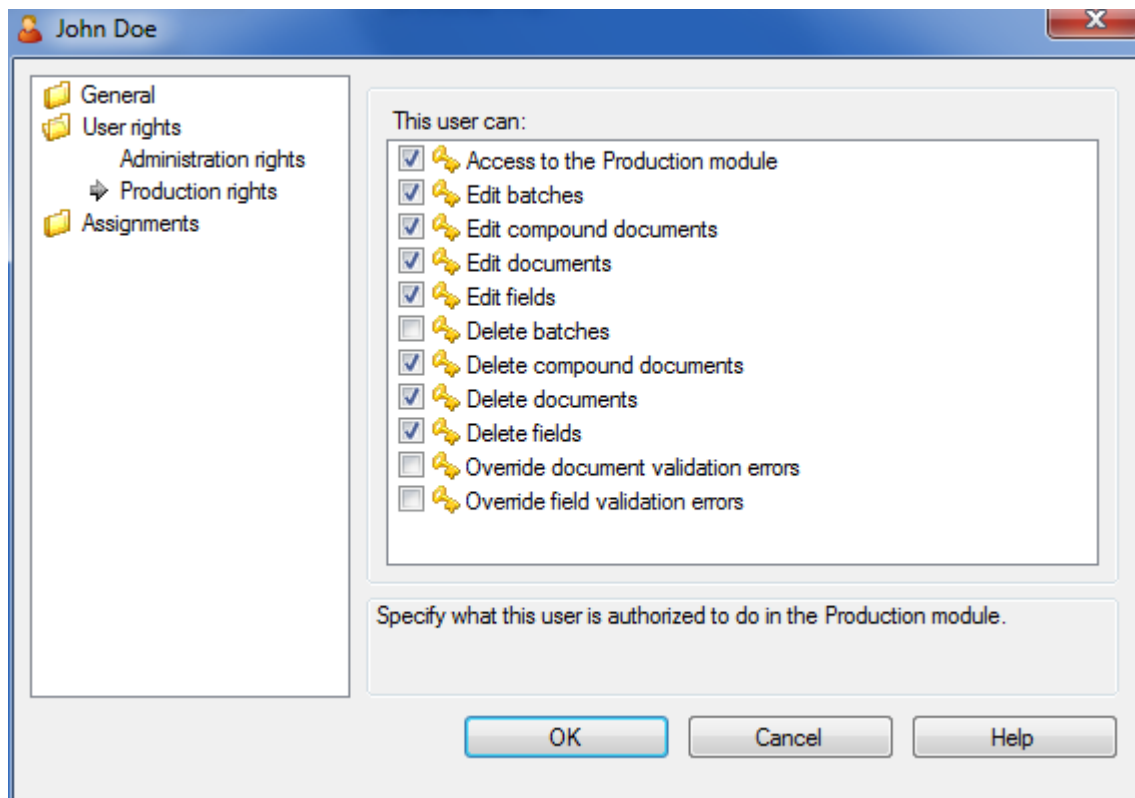
Database security

DOCUMENTS can access the database using Windows Authentication or using an SQL Server user.

System control

Control is what organizations need and want. Knowing where a document is in the organization is important in order to provide the best possible support to in-house staff and departments as well as customers. DOCUMENTS has different tools that provide this control.

Supervision

The Administration module has a **Supervision** tab (to which access can be limited by user rights), where "super users" or IT staff can view the system-wide and document-specific data to learn who did what and when. Functionality includes:

- Solution overview – a status report for documents found in a runtime system.

- Process statistics – statistics for documents, compounds, or batches in a selected solution.

- Document audit trail – a record of everything that is done with each document as it is processed through the system.

- System audit trail – displays significant production events, when they occurred, and the specifications and users involved. Easy-to-access information divided into five categories with filtering functions.

- Queue overview – shows information for queues used in the solution, for example how many documents are waiting to be processed in a selected activity.

- Extensive search functionality – search for a document to find out where in the process the document is.

REPORTER

For added security and a new dimension of control, you can connect your DOCUMENTS system to REPORTER, which collects data about what happens in invoice solutions and makes it available to you in the form of *reports*. You can use REPORTER to monitor invoice processing efficiency, user performance, and more.

Maintainability and supportability

Is it easy to maintain the DOCUMENTS system? Is it easy to give support to its users? If something goes wrong, what type of support exists to help us find out what is wrong and handle it?

Maintainability and support involves quick-and-easy upgrades, data backups to ensure that no data is lost, manuals, and other support tools to keep down-time as short as possible and ensure that errors or other issues can be handled easily.

There are several logs and tools that IT staff can use to determine what is wrong.

Upgrades and updates

Updates and upgrades are easy and fast to do. A full uninstall and install are not required when updates are available. Scripts are used to update existing systems, and these can be installed and uninstalled without wiping out the underlying installation.

Updates and patches are released on a regular basis.

Data backup

All system settings and configurations are easily exported or backed up using the backup tools available in DOCUMENTS and Microsoft SQL Server.

Product documentation

DOCUMENTS has thorough online help that can be used in all situations to find out how to handle different situations, both during setup and during production. The help is easy to use, with different access methods such as pressing F1 in the application, using the Index or Table of Contents, and searching. Suggested related topics are always offered, to help you find the information you need as quickly as possible.

In addition, PDF documents are available on specialized topics such as product installation, Microsoft SQL Server configuration, licensing procedures, and so on – and you will find links to all of these in the online Help.

Online knowledge base

ReadSoft has an online and web-based knowledge base where partners, customers, and employees can share their experience and skills with others. ReadSoft's knowledge base is unique in terms of the skill and experience available, and it is highly appreciated by all users of ReadSoft's products!

User support

If the product documentation and the knowledge base do not contain the answers to your questions or issues, ReadSoft's support organization help. ReadSoft Support has sites in place all over the world, in order to offer the best support whenever it is needed – 24 hours a day, five days a week, all year around. The people working in Support have expert skills and experience in ReadSoft's products, as well as in Windows operating systems, and can therefore help with the most difficult questions and issues.

Log files

Everything that is done in DOCUMENTS can be logged. There are several levels of logging to choose from, depending on how much you want to keep track of. The more detail you

include, the larger the resulting log files. The logging levels are as listed below, in order of complexity:

- Error level – only application errors are logged. This is the most basic level.

- Application level – only application events are logged. This includes errors, starting and ending the program, opening and closing the main program windows, and opening and closing the databases.

- Function level – in addition to the application-level events, you get menu calls, API calls (and events fired), and production events (production task load, activity executed, and so on).

- Object level – in addition to the above, this level includes changes made to program objects (solutions, documents, fields, and so on).

- Debug level – in addition to the above, this level also logs when function calls start and end, as well as exceptions. This is very advanced logging and should only be used in special circumstances.

The logging level is easy to adjust. You can also specify whether the log information is stored to file or in the Windows Event log. The log files have an XML structure so that you can more easily pick out specific messages such as errors.

Troubleshooting using AppSight Black Box

If none of the above tools can show what is wrong, AppSight Black Box can be used for better tracking of the actual error. AppSight Black Box records all API calls, events and changes as the error is reproduced. The result is sent to ReadSoft for analysis. The tool is delivered with the installation.

Stability and accuracy

The key to success for an IT Manager, "super user", or system administrator is a stable system that delivers the best possible results and supports all available industry standards. For large enterprises with high volumes, it is important that the system uptime is reliable, because downtime or error-prone data may have consequences. A stable system also means less administration and support, leaving resources available for more important activities.

ReadSoft has chosen to make sure of this by offering the following things.

Release module with main track and feature track

DOCUMENTS has a release module, which means that it has a stable track and a feature track. These tracks exist to ensure that all versions of ReadSoft's products are as stable as they can possibly be.

All new features (that is, features implemented for an upcoming major release) are implemented on the feature track. The stable track is where most customers should be, because it is extensively tested. The only updates made to a stable track are bug fixes that make the track even more stable. Any bug fixes on the stable track are delivered as patches.

Customers who request new features and/or are willing to test new features are on the feature track. New features are delivered as separate releases called "R" releases according to Microsoft standard. These are, at first, not as well tested as the patches available on the stable track. However, as they are tested in-house and by customers and partners, they become as stable as any feature on the stable track.

Features implemented on the feature track are merged to the stable track in time for a new minor or major release when they have been extensively tested and are considered to be as stable the other features on the stable track.
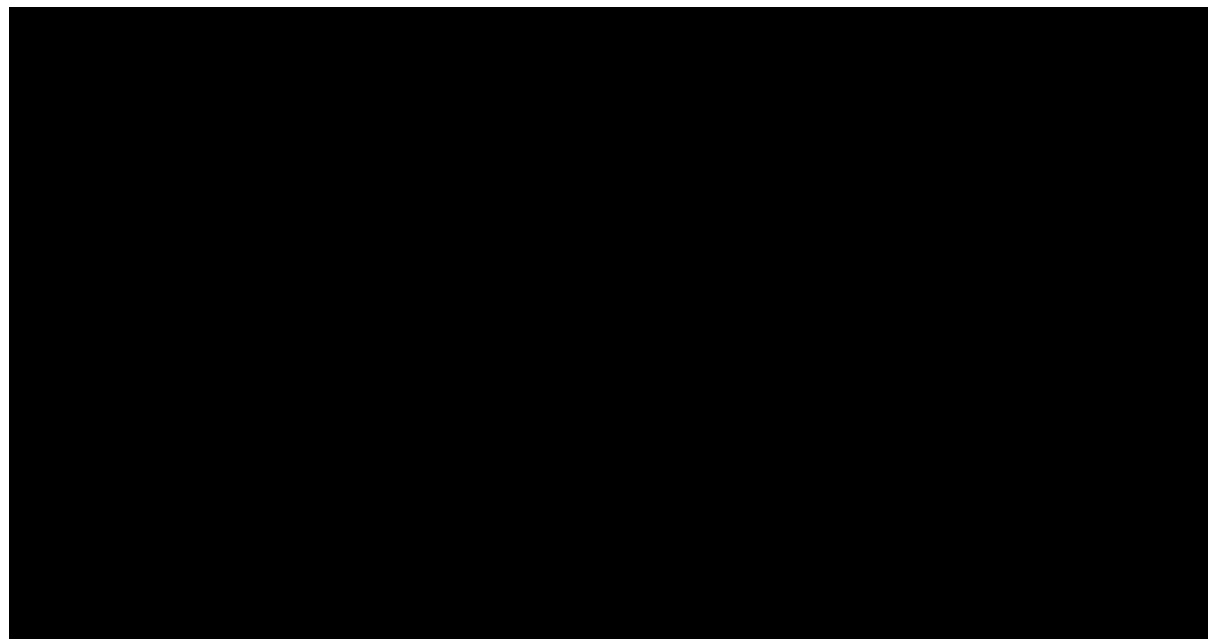
Click the start button to view a video showing a hypothetical progression of DOCUMENTS 7.2 patches and hotfixes that continues to DOCUMENTS 7.3.

Validations, queues, and data capture security

Not all Verify operators have the skills to enter or validate captured data or documents. An incorrect field value can have significant consequences, which is why DOCUMENTS offers sophisticated validation routines. For example, DOCUMENTS can ensure that the sum of all order items matches the total sum given for the order, or it can check customer numbers against an external list to ensure that a captured customer number actually exists. These are just a few simple examples.

Not all fields or documents should be accessible to all users, and important documents should have top priority. These issues can be addressed in DOCUMENTS using *queues*. Queues can be used to separate the top priority documents to make sure that they are processed before any others. They can also be used to route documents to specific users or user groups. Or, for example, an add-on could use queues to ensure that a "super user" validates every 10th document for quality control purposes.

DOCUMENTS has also internal security for all fields and characters captured. If DOCUMENTS is unsure of a particular character or field value, the field is flagged for manual verification.

Validations, queues, and data capture security ensure that the system delivers consistent results without any errors.

System and network load

Load balancing? Image file size reduced? File cache and data storage? EiPå: I've added the below, which came from the SCG. Please check whether it's appropriate – and possibly add something more (otherwise we need to adjust the rubrik).

As the entire production process starts with and revolves around image files, image management is an important consideration. A number of settings and features in DOCUMENTS allow you to optimize image management, reducing the amount of image data sent across your network.

For example, DOCUMENTS can create several variations of each image, and access only the one needed for a certain activity. Using several images, each created for a specific purpose, increases production efficiency, particularly when sending images over a network with limited bandwidth.

Configurable and customizable

As business needs change over time, new requirements may emerge. It is therefore important that a system is configurable and – in case it should prove necessary – customizable.

When a system is *configurable*, it can be adapted to new situations by simply changing some settings. This can often be very quickly – in just a few minutes! When a system is

customizable, it can be extended or modified by adding specially-created add-ons, from a small DLL that deals with a unique security requirement coming from upper management, to a collection of XXX describe something, please!

DOCUMENTS is both configurable and customizable, which is one of the reasons it is considered to be the best choice for businesses with changing needs.

Validation rules

One way in which DOCUMENTS is configurable is by its *validation rules*. You use these to automatically confirm the validity of the extracted data.

Validation rules can apply to individual fields, to all fields on a document, or to all fields on all documents that are included in a compound or batch. When the data is found to be in question, *you* specify how to handle it. For example, in many cases, the data can be corrected automatically. It can also be displayed to a Verify operator for correction, deleted, sent to a queue (queues are described on page 20), etc.

Here are some examples to give you an idea of what validation rules can mean concretely in your process:

- Let's say you have invoices where you want to ensure that the date is within a certain range. You iuse a *field validation rule* to specify the range and that dates outside that range are to displayed to a Verify operator for checking.

- You have an order form that customers use to order products. It contains product prices and the total sum. You can use a *document validation rule* to find the sum of those price fields, provide the correct value if the sum on the form was incorrect, and describe the error that occurred to a Verify operator.

- You have two documents in a compound, and in order to check that they concern the same person you need to check the Social Security Number (SSN). If the SSN is not the same on both documents, one option is to manually verify each SSN. Another option is to copy the SSN from the first document to the SSN field of the second document. You use a *compound document validation rule* to set this up.

None of this requires any coding in DOCUMENTS, as it would in other vendors' solutions. A "super user" or administrator can easily set up or adjust validation without any programming skills.

Advanced API

DOCUMENTS has a very advanced API that allows almost any type of customization. Examples include external validations or customized workflows using queues.

Customizations are done by implementing external DLLs, called an add-ons or plug-ins, that are connected to *events* in DOCUMENTS. They are like enhancements or additions to existing features. With a customization, the DOCUMENTS code remains unchanged. An add-on is easily activated or deactivated, and it never affects the core product.

The API is well documented and can be used by anyone with programming skills. However, we recommend using ReadSoft Alliance Partners for help implementing the more complex customizations and for help designing the solutions. ReadSoft also offers API training to make the process of making customizations as quick and easy as possible.

Software Development Kit (SDK)

ReadSoft Service Bus (or RSB – see page 14), is a component that facilitates connections between two systems, such as between DOCUMENTS and a target system. RSB has a Software Development Kit (SDK) that ReadSoft Alliance Partners can use to quickly and easily create integrations – if the integration that you need doesn't already exist. (Many are already available!) This minimizes upgrade compatibility issues and results in a lower cost of ownership.

Compatibility

A data capture system is not always a stand-alone solution or even the larger part of a complete solution. Most often the complete solution includes workflows, archives, and other business tools. It is therefore important to make sure that the selected data capture solution is compatible with the other products in order to deliver a stable and secure solution that is easy to maintain.

But there are even more considerations: Not only do the programs need to be compatible with each other; it is also important that the hardware and software are compatible. You want to avoid having to install, maintain and support any more servers—with various hardware configurations and operating systems, for example—than absolutely necessary, because this can be both expensive and time consuming.

DOCUMENTS ensures compatibility with a wide variety of standard software components and application environments. This compatibility ensures maximum productivity and minimum downtime. Please see "System environment and database support" on page 8 for more information on Microsoft Windows operating systems databases, Terminal Services and Citrix.

Scanners

ReadSoft products include support for many popular scanners on the market. All supported scanners are tested and certified to ensure that they deliver high-quality images for the solution, from input to workflow and archive. Please see ReadSoft's website for details on which scanners are certified and recommended.
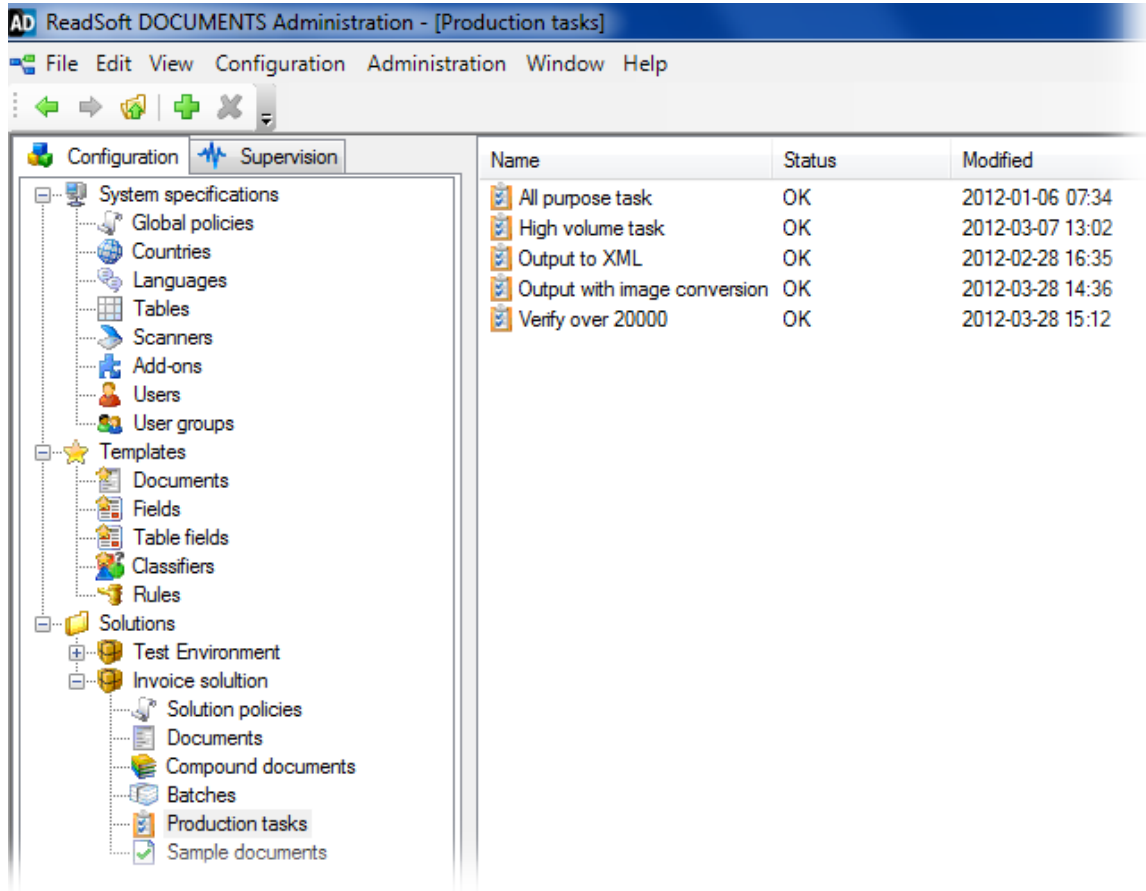
Network and Communications Protocols

DOCUMENTS supports standard communications ports, TCP/UDP, HTTP/HTTPS, SSL and Standard Windows Networking. Carl?
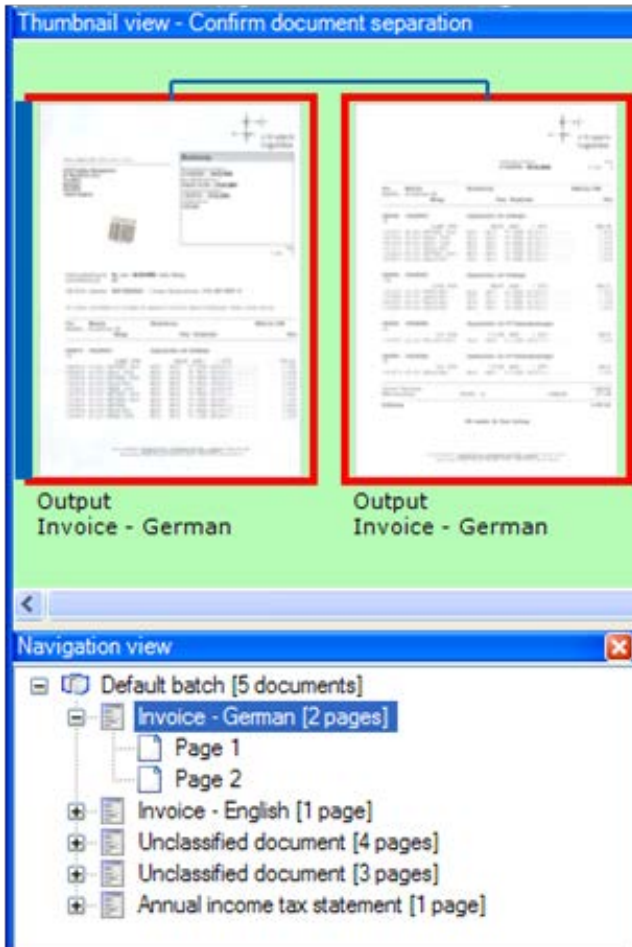
Usability

As with all ReadSoft products, DOCUMENTS is well known and appreciated for its user-friendly interfaces. It is important to *everyone* using the product—from IT managers to "super users", and perhaps especially to Verify operators and others who use it daily—that the interface is easy and efficient to use. A complicated or cumbersome user interface often leads to errors or slow processing. A user-friendly environment, on the other hand, makes the job fast, secure, and easy, resulting in higher performance and better support, both within your organization and to your customers.

DOCUMENTS user interface delivers:

- Efficient manual classification of documents and pages.

- Fast manual separation of images into documents, if necessary.

- The ability to manually type in the data while viewing the document image, if necessary.

- Specialized interface for verifying captured invoice data.

- "Four-eyes principle", which means that extracted data can be quality assured by more than one person.

- Web Verify for invoice verification – no rich client needed. Verify operators use a web browser to log on and connect to the DOCUMENTS system.

The DOCUMENTS Administration module.

Adjusting and confirming document boundaries in Inspect.

Verifying line items.

Conclusion

EiPå: This is a sales-oriented pitch that I think someone else should write.

For more information

Please contact ReadSoft Lab – Capture Solutions for more information.